Procedure for Approval, Purchase, Payment and Inventory of Wireless Communication Devices (WCD*) and Services

Background:

In order to comply with the Georgia Office of Planning and Budget Policy Memorandum No. 4 (Revision 8) effective August 1, 2004, which requires that each state agency manage and minimize the costs of using telecommunications equipment and services, the university has developed University of Georgia Telecommunications Policy for Wireless Devices/Cellular Telephones, Long Distance Usage, and Home/Off Campus Internet Access. All University of Georgia units should read and become familiar with the requirements of the policy. The following procedure defines the steps required to purchase a University owned device/service or request reimbursement for business related communication charges on personal communication plans.

Definition: Wireless Communication Devices are defined as devices that receive or send transmission for the purpose of providing business related, personal voice and text messaging communications services. Examples of WCD include, but are not limited to: cellular or PCS phones, Blackberries, Personal Digital Assistants (PDAs) with connectivity, two way radios (traditional and trunked technologies), internet services and pagers.

1.1 Guidelines for University owned Wireless Communication Devices (WCD), services/plans and internet service

1.1.1 Approval and Authorization

A. Approval: WCD and/or Services that are predominantly used for the benefit of the University should be purchased and paid for by the University, and require approval and authorization. If an employee has a business requirement for a WCD they should contact their Departmental Telephone Representative in order to have a formal request submitted thru the WCD Approval System for authorization to purchase WCD device/service. Only Telephone Representatives have the ability to submit a request for authorization to purchase a WCD device/service.

Note: You may contact the UGA Telephone Services Office at 542-6962 for the name of your Departmental Telephone Representative

B. Authorization: After the request for a WCD/service is approved, an authorization number is assigned by the UGA Telephone Services Office. An email notification of the Authorization number will be sent to the Departmental Telephone Representative and the requestor of the device/service. This Authorization number must be included on any request for purchase or payment.

1.1.2 Purchase and Payment

After the Authorization number has been obtained, a purchase request for WCD/cellular telephone device and/or services should be submitted to the Procurement Office as indicated below. Most wireless devices and services are available under statewide contracts with carriers as noted on the Georgia Technology Authority website for wireless communication services (http://gta.georgia.gov).

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- **Cellular:** Initial Purchase or upgrade of a device and initial set up of services must be submitted on a purchase request to the Procurement Office. All cellular devices and services are available on statewide contract. Only devices will be encumbered. A waiver from the Procurement Office is required for any exemption from use of the statewide contract. Payment for devices will be made against the Purchase Order and payment for service can be processed on a check request or P-card. Departments must post P-card charges to the correct object code (76932).

- **PDA (Personal Digital Assistant) or Blackberry:** Initial Purchase or upgrade of a device and initial set up of services must be submitted on a purchase request to Procurement Office. All services must be purchased thru statewide contract (unless a waiver is granted by the Procurement Office). The Purchase of a device without service must be submitted on a purchase request and may be from a statewide contract or a vendor of choice. Only the cost of devices will be encumbered. Payment for devices will be made against the Purchase Order and payment for service can be processed on a check request or P-card. Departments must post P-card charges to the correct object code (76910).

- **Two-way radios:**
  
  A. **Trunked (800 MHz)**

  - UGA Department must contact Motorola to obtain a price quote for the equipment they wish to purchase.
  - Departmental Telephone Representative will submit a request for the Authorization to purchase equipment/service thru the UGA WCD Approval System.
  - UGA Department will send a memo to Telephone Services requesting that the 800MHz service and equipment be ordered thru Georgia Technology Authority (GTA). Memo must include:
    - Description of equipment (including model number)
    - All costs
    - Reference to the State of Georgia contract number
    - Programming Instructions
    - Contact and Delivery information
    - WCD Authorization numbers
    - UGA account number to be charged
    - Motorola price quote
  - Telephone Services will forward all information to the Office of the Chief Information Officer (CIO) at UGA for approval.
  - The CIO will forward the information to the Vice Chancellor for Information & Instructional Technology/CIO Board of Regents for approval.
  - If the request is approved, Telephone Services will send a memo to the GTA Wireless Product Manager to purchase the equipment and bill the UGA account.
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- GTA will bill the UGA account on their monthly GTA Telecom Services Invoice.

B. All other two-way radios: Once approval is obtained thru WCD approval system, submit a purchase request to Procurement. Multiple contracts are available thru GTA (http://gta.georgia.gov - select Procurement, select Hardware Contracts, select Two-Way Radios). Only the cost of devices will be encumbered. A waiver from the Procurement Office is required for any exemption from use of the statewide contract. Payment for devices will be made against the Purchase Order and payment for service can be processed on a check request or P-card. Departments must post P-card charges to the correct object code (76930).

- Internet Service Provider (ISP): Once authorization is obtained from Telephone Services, the end user may initiate service with the approved provider. Service charges may be handled via P-card or check request. Departments must post P-card charges to the correct object code (76910). All contractual agreements with Internet Service Providers must be reviewed by the Procurement Office to ensure conformity with state contract guidelines. Any contracts signed by an unauthorized employee or signed without review by the Procurement Office are in effect, personal obligations of the employee.

- Pagers:
  - Leasing State Owned Pagers:
    - The Department will contact their local GTA Regional Office to obtain pricing for a GTA issued pager. GTA Regional Office information can be found at www.ganet.org/gta.
    - The Departmental Telephone Representative will submit the request for approval to lease a pager thru the WCD approval system.
    - If approved, an Authorization number will be issued.
    - The Departmental Telephone Representative will send a Telephone Service Request form http://www.busfin.uga.edu/forms/telephone_service_request to the appropriate GTA office.
    - The Departmental Telephone Representative will be notified by GTA when the pager is available.
    - GTA will bill the UGA account on their monthly GTA Telecom Services Invoice.
  
  - Purchase/Lease of Non-State Owned Pagers: As statewide contracts do not exist for these type of pagers, the department can utilize the vendor of choice. Once authorization is obtained from Telephone Services, the end user must submit a purchase request to the Procurement Office for the purchase/lease of the pager. Payment for devices will be made against the Purchase Order and
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payment for monthly service should be processed on a check request or P-card. Departments must post P-card charges to the correct object code (76930).

1.1.3 Inventory

Annual Review: Each year the UGA Office of Telephone Services/Office of the CIO will notify Departmental Telephone Representatives to review and update the department WCD inventory. The review and update to the department WCD inventory will be an annual process. Specific instructions will be provided by the UGA Office of Telephone Services/Office of the CIO at the time of the review/update process.

1.1.4 Discontinuation of Service

Upon discontinuation of WCD/cellular service, the equipment should be forwarded to Telephone Services/Office of the CIO and the unit telephone representative will enter the appropriate annotations in the WCD System to update the inventory of wireless devices. Telephone Services will then forward the equipment to Property Control.

2.1 Guidelines for Reimbursement of University Usage of Personal Service Plans/ Devices and Internet Service.

2.1.1 Cellular usage: To request reimbursement for University usage of Personal Service Plans, fill out a Check Request and attach the completed “Reimbursement Request for Business Related Wireless Communication Charges Made on Personal Communication Plans” form (link) and a copy of the service provider statement invoice. Reimbursement to employees for business related communications made using minutes or measured service of a service plan will be reimbursed in proportion to the percentage of business use as outlined below:

• Business related communications which are less than 25% of the total usage of the service plan will not be reimbursed.
• Business related communications which are 26%-75% of the total usage of the plan will be reimbursed on a pro-rata basis. The percentage of business use will be applied to the monthly service charge applicable to the rate plan as printed on the vendor’s bill (excluding usage charges, local air or data charges, long distance charges, roaming charges, surcharges, fees, taxes, and other miscellaneous charges).
• Business related communications which are in excess of 75% of the total usage of the service plan will not be reimbursed. If business use of a personal device routinely exceeds 75%, such use should be reviewed to determine if the employee’s communication needs meet the criteria for a University issued device.

2.1.2 Internet usage: To request reimbursement for University usage of internet service fill out a Check Request and attach the completed and signed “Reimbursement Request for Business Related Wireless Communication Charges Made on Personal Communication Plans” form (put in link) and a copy of the service provider statement invoice.
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- Reimbursement to employees for business related internet access will be for 50% of the monthly access fee (excluding taxes and other charges) or $20 per month, whichever is less.

3.1 Refunds to UGA for personal use of University purchased WCD service. If a situation arises that requires extensive or extended use of the WCD/cellular telephone for personal calls, the staff member is to notify their Vice President or Dean and reimburse the University for those calls that create additional charges. Reimbursement under such circumstances will be submitted to the Departmental Telephone Representative along with a copy of the phone bill indicating the additional cost due to such circumstances. Such reimbursement should be deposited in the Bursar’s Office with an appropriate deposit transmittal form (http://www.busfin.uga.edu/forms/deposit_transmittal.pdf).

4.1 The Right to Monitor Communications and Open Records
The University reserves the right to investigate, retrieve and read any communication or data composed, transmitted or received through voice services, online connections and/or stored on its servers and/or property, without further notice to employees, to the maximum extent permissible by law.

5.1 Information for devices/service in place prior to implementation of UGA Telecommunications Policy for Wireless Devices/Cellular Telephones, Long Distance Usage, and Home/Off Campus Internet Access (September 22, 2005). The online WCD approval system was activated July 1, 2005. All new requests for devices/service have been processed thru the approval system since that date. Departmental Telephone Representatives have been charged with using the “Add Grandfathered Requests” component of the web approval system to ensure that all active devices/service are included in the inventory and have an Authorization Number. The “Add Grandfathered Requests” component will be removed from the web page December 31, 2005. After that date, a new request will have to be submitted to receive an Authorization Number.

Accounts Payable will no longer be allowed to process WCD invoices without an Authorization number, to avoid disruption of service it will be imperative for the department to comply with the policy and obtain an Authorization number.

Effective September 2005